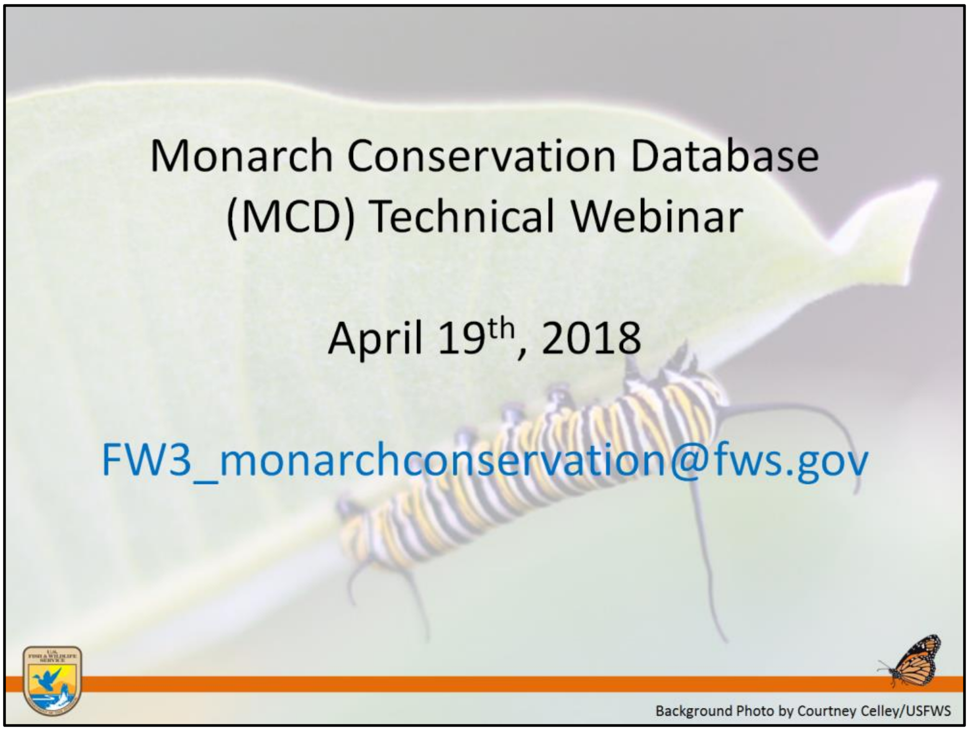
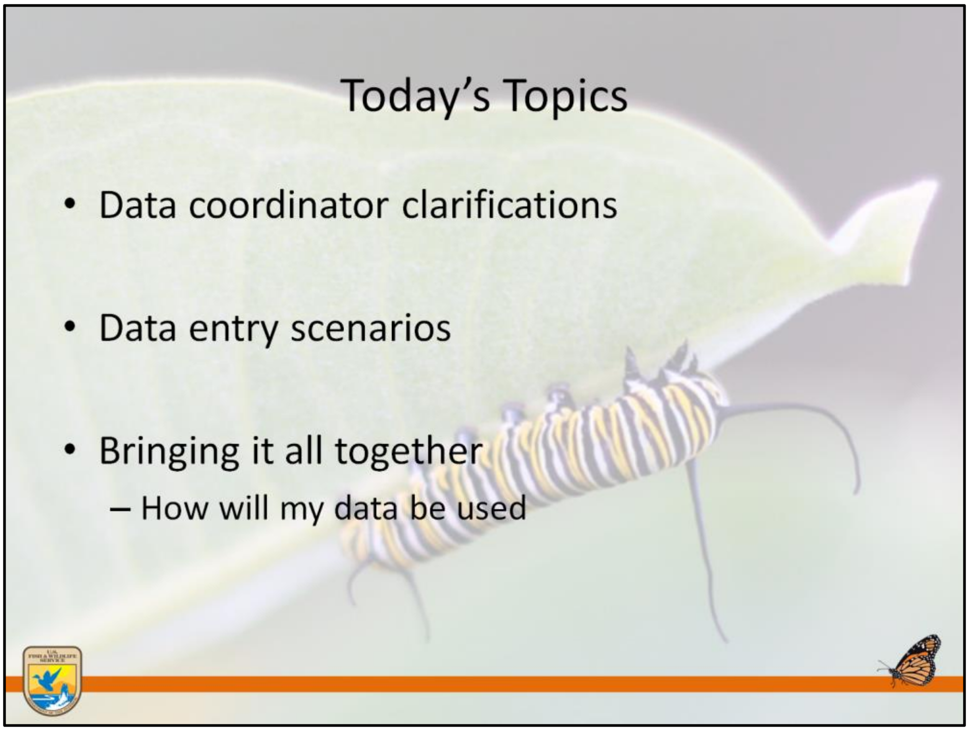
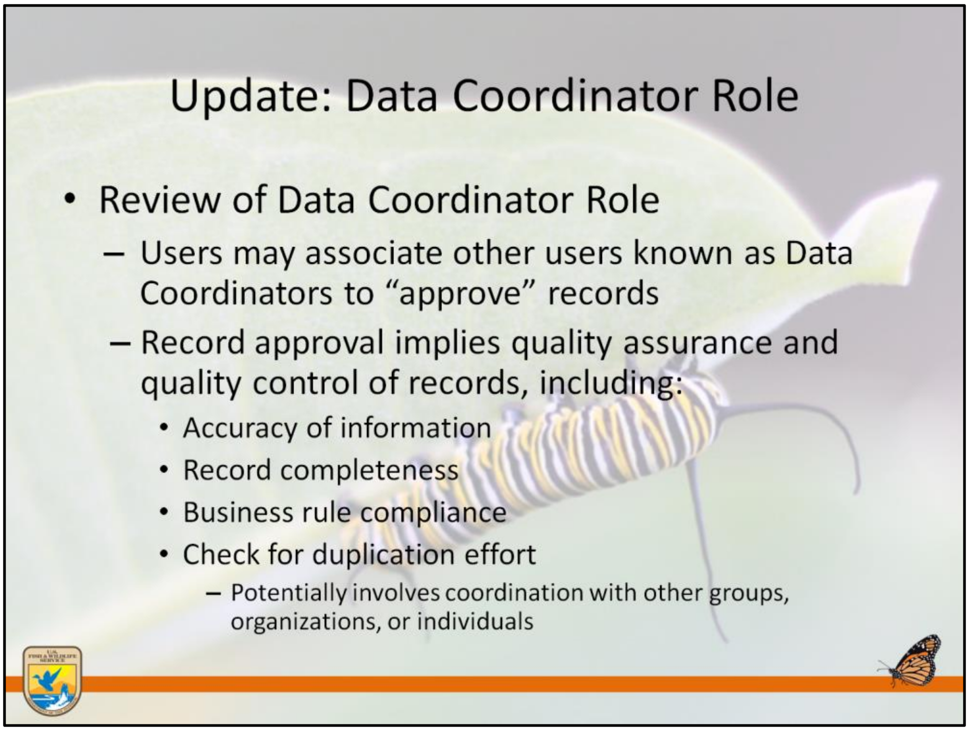


- Hello and welcome to the April 2018 Monarch Conservation Database technical webinar. My name is Steve Choy and I am coordinating the development of our database. As with the other technical webinars, PDF versions of this presentation will be posted on the database website along with the script and any other supplemental materials we'll be showing today.



- We would like to maximize time for participant questions during this webinar as this will be the last webinar before the Monarch Conservation Database web application goes live. So, today the presentation portion will mostly be updates and reviews including:
  - An update regarding the Data Coordinator role
  - An introduction to some new and updated materials to help users determine the best way provide information, and what information will be required based on their particular situation, and
  - A review of how information in the database will be used



- During the February webinar, we introduced the Data Coordinator role. To re-cap, when registering to gain access to the database web application, potential users must choose a role. The options to choose from are either a standard user role (known as a Data Editor), or a role with the additional capabilities and responsibilities, known as a Data Coordinator. Any user (whether Data Editor or Data Coordinator) can associate their effort records with a Data Coordinator to review and approve their database entries. Initially, this was a required step for submittal of effort records
- The purpose of the Data Coordinator role was to ensure that effort records undergo some quality assurance and quality control before submittal to the database, which broadly includes ensuring that:
    - information provided is accurate
    - records are complete
    - information provided does not contradict or is not in conflict with other information in the same record, and that
    - records are not duplicated

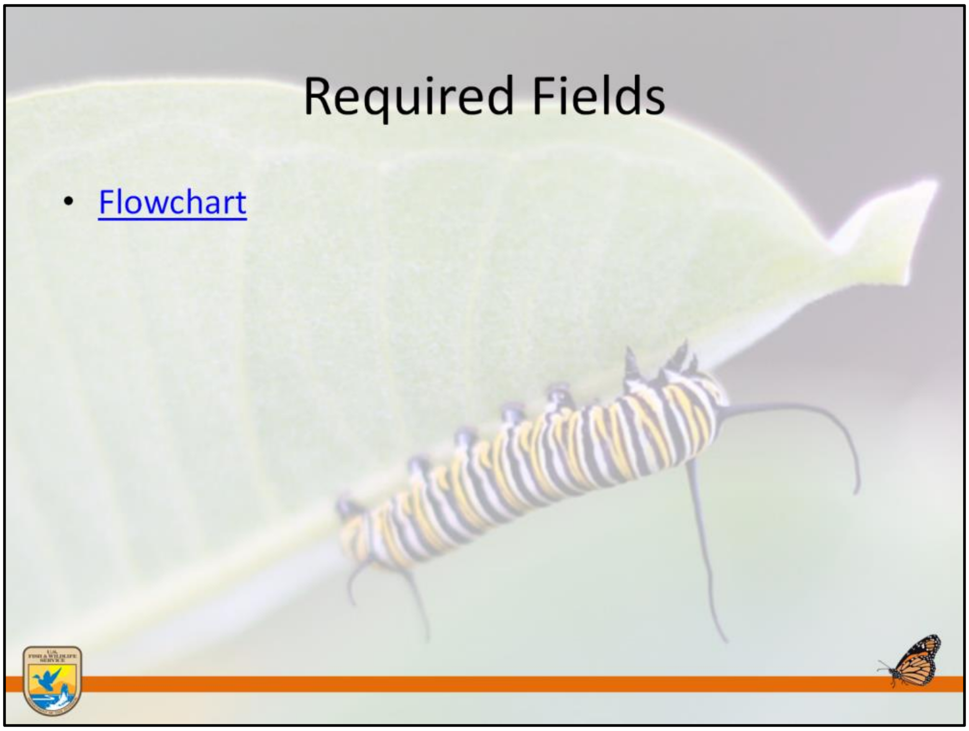
- Due to the short initial data collection period, we have decided not to make Data Coordinator approval of effort records required at this time
  - However, the functionality of the Data Coordinator role is still there. So, if users choose, they may still:
    - Request the Data Coordinator role during the database web application registration process,
    - Associate effort records with Data Coordinators, and
    - Review and approve records you are associated with if you are a Data Coordinator

Data Entry Methods

Number of Efforts	Are the efforts associated with a plan?	Step 1	Step 2
1 or a few	No	Enter **effort** information using single record editor	N/A
1 or a few	Yes	Enter **plan** information using single record editor	Enter **effort** information using single record editor and associated effort(s) with plan
Many	No	Enter **effort** information using bulk upload feature	N/A
Many	Yes	Enter **plan** information using single record editor	Enter **effort** information using bulk upload feature and associate effort(s) with plan in templates or through single record editor

- Next, I'll discuss the basic ways of entering data into the database using the web application. There are two ways to enter data: using the single record editor, through which database records are created one at a time. The single record editor may be used to create and edit plan and effort records. The other option is using the bulk upload feature, which allows you to create and upload multiple database records at a time. The bulk upload feature is only available for effort records. You may recall from previous webinars that, in the context of the Monarch Conservation Database, an effort record is composed of information regarding a specific site and the on-the-ground activity or activities implemented at the site. In order to help users determine the best method to use, we have sketched out a few cases in this table:
    - If a user has one or only a few effort records and the efforts are not associated with a plan, we would suggest simply using the single record editor of the web application
        - For example, a private land owner who has created a 5 acre prairie wishes to provide their project information in the database can use the single record editor to enter their effort information
    - If a user has one or only a few effort records and those efforts are associated with a plan, they would first enter the plan information and then enter information about their effort using the single record editor. They would then associate their effort with the plan they entered into the database

    - For example, a business that owns a few properties on which efforts are being implemented as a part of a plan would start by providing plan information and then enter the effort information using the single record editor. When the user enters information about the effort, there is an optional field populated through a drop down menu to link the effort to a plan. If the user has already provided plan information, the plan will appear as an option in the drop down menu
  - If a user has many efforts but none of them are associated with plans, they could choose to use one of the bulk upload templates
    - For example, a Non-governmental organization who is implementing multiple efforts that are not being implemented as a part of a plan may use one of the bulk upload templates which allows them to create and upload many efforts at one time
  - If a user has multiple efforts and they are associated with a plan, we recommend first entering the plan into the database and then subsequently filling out one of the bulk upload templates to upload multiple efforts at one time. It saves time to enter the plan information first.
    - For example, a state agency that is implementing many efforts across a state under a state habitat management plan should first provide information about the plan using the single record editor and then populate a bulk upload template, being careful to spell the plan name the exact same way for both steps.
- To reiterate, if the efforts are implemented under a plan and you wish to associate your efforts with a plan, we suggest entering the plan information first, before entering effort information, or searching for the plan to see if it has already been added to the database. This will facilitate the process of associating plans with efforts as the system will recognize the plan.



- After determining which method of data entry is most appropriate for your circumstance, the next step would be to identify what information is required. This is based on whether your efforts are associated with a plan, as well as the implementation status of your efforts
- We have developed a work flow chart to help users determine the fields that will likely be required for them; this document will be made available on the MCD website
- (Walk through flow chart and discuss scenarios)

Required Fields: Scenario A

- Efforts are not associated with a plan

Site	Activity
Site Name	Activity
Implementing organization	Sub-activity
Baseline land use classification	Status
Land use classification post effort (if different from baseline)	Start date
Acres	
State/ County	

- Once a user determines what scenario they fall under, they can use the following tables to get a sense of what specific fields they will have to populate in order for their records to be considered complete.
- You may remember these tables from the previous webinar. For example, let's say that after going through the flowchart, you determined that you were in Scenario B, where your efforts are being implemented as a part of a plan and all of the efforts are complete and have been for more than 3 years. You would find the table for Scenario B to find the required fields. I have included updated tables with the required fields for each scenario in this presentation
- Additionally, if we go back to the flowchart, you can see that the scenario boxes are linked to the tables listing required fields. Again, this document will be made available on the MCD website
- You may have noted that the criteria for needing to populate PECE effectiveness questions have changed. Now, PECE effectiveness questions need to also be answered if the effort is complete but has been for less than 3 years. This is to account for the fact that it may take a few years for the conservation effort to confer benefits or reduce threats

Required Fields: Scenario B

- Efforts are associated with a plan and the efforts are all complete and have been for at least 3 years

Plan	Site	Activity
Plan Name	Site Name	Activity
Author organization	Implementing organization	Sub-activity
Implementation status of efforts associated with the plan	Baseline land use classification	Status
If the plan is finalized	Land use classification post effort (if different from baseline)	Start date
	Acres	
	State/County	

Required Fields: Scenario C

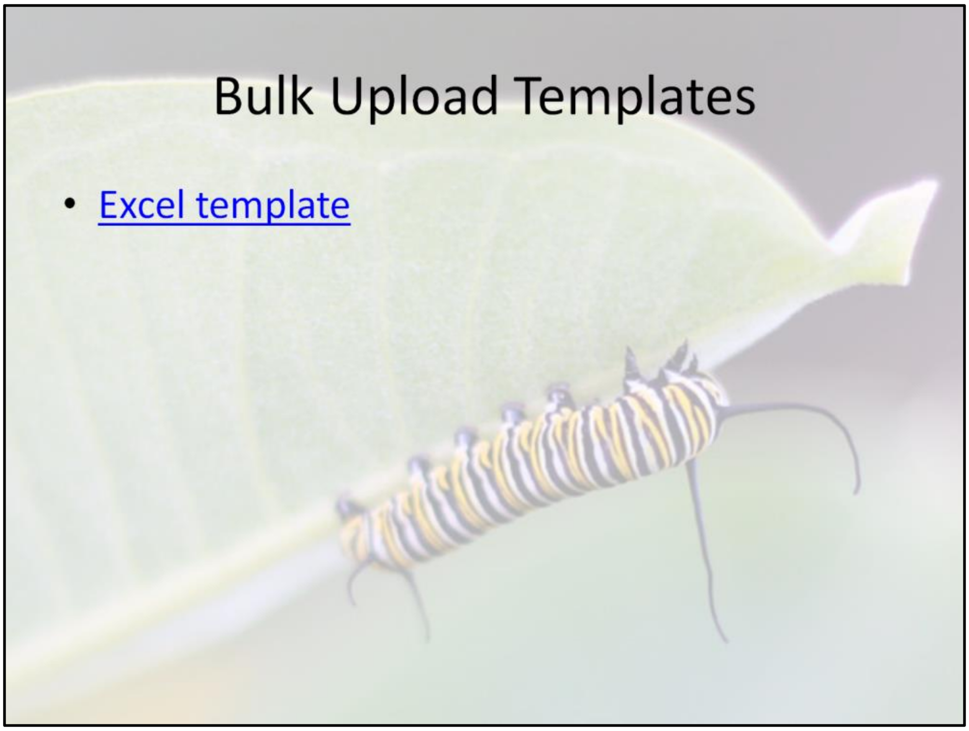
- Efforts are associated with a plan and all efforts are complete but for less than 3 years or have been implemented but are not yet complete

Plan	Site	Activity
Plan Name	Site Name	Activity
Author organization	Implementing organization	Sub-activity
Implementation status of efforts associated with the plan	Baseline land use classification	Status
If the plan is finalized	Land use classification post effort (if different from baseline)	Start date
	Acres	PECE effectiveness questions (6)
	State/County	

Required Fields: Scenario D

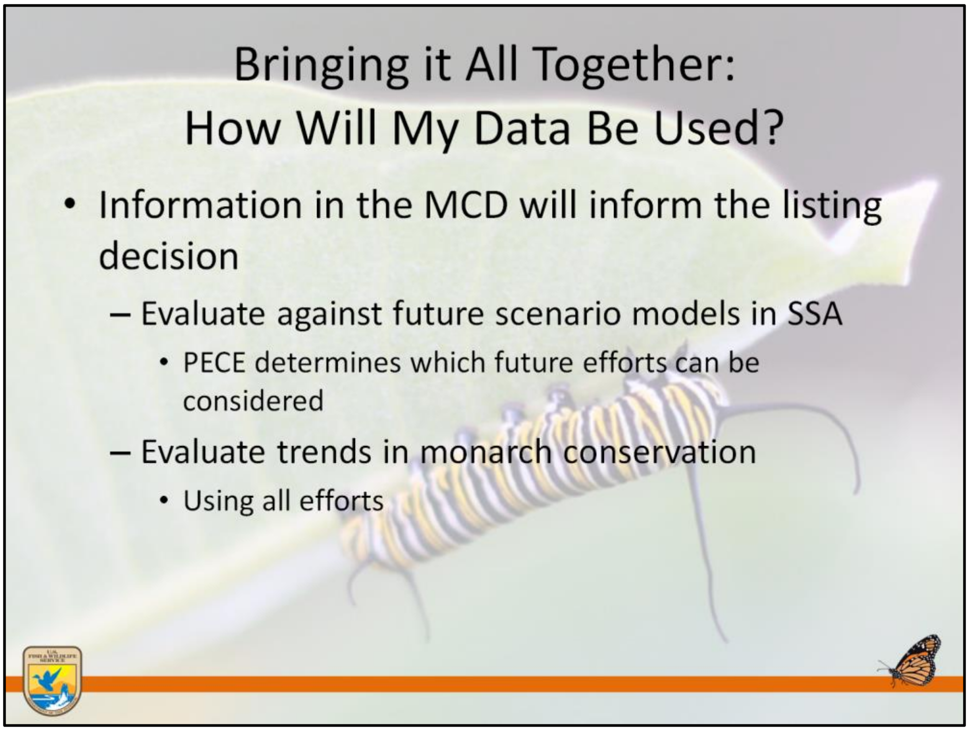
- Efforts are associated with a plan but there are efforts that have not yet been implemented

Plan	Site	Activity
Plan Name	Site Name	Activity
Author organization	Implementing organization	Sub-activity
Implementation status of efforts associated with the plan	Baseline land use classification	Status
If the plan is finalized	Land use classification post effort (if different from baseline)	Start date
PECE implementation questions (9)	Acres	PECE effectiveness questions (6)
	State/County	



- We also thought it would be useful to walk through initial versions of our bulk upload templates.
- Note that we were initially going to allow users to upload plans in bulk. However, we determined that there would not be many instances of users needing this feature. If you believe that a bulk upload option for plans is necessary, please let us know as soon as possible at FW3_monarchconservation@fws.gov.
- Additionally, we have elected to eliminate the file geodatabase template; now there will be only two templates to choose from: an excel template and a shapefile template.
- The excel template is the simplest. We have color-coded each field to indicate whether or not it is required. Fields that are minimally required for completion of the bulk upload are highlighted in red. Fields that are not required for the bulk upload to be successful but are required for the record to be considered complete are highlighted in yellow.
- Further, efforts that are required on a conditional basis are starred. For example, the PECE effectiveness questions for effort records are only required if the effort is being implemented as a part of a plan, and the status of the effort is “Not Yet Implemented,” “Implemented,” or “Complete but for less than 3 years.” Again, you can refer to the flowchart to determine which conditionally required fields are applicable to you.
- While you may successfully complete a bulk upload of effort records populating only the fields highlighted in red, we would recommend filling in at least all fields

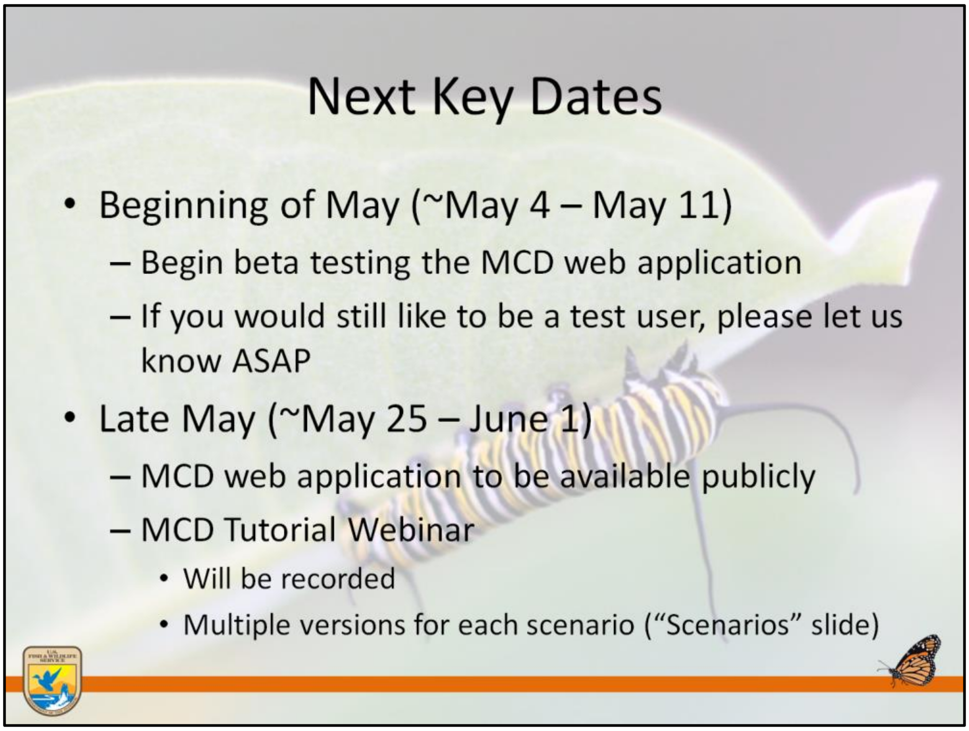
in red and yellow if possible to avoid having to populate those fields on a record by record basis after the fact. For fields that have many options for drop down menus, the options should match what is available through the single record editor; otherwise, we will make lists of the options available on the MCD website.



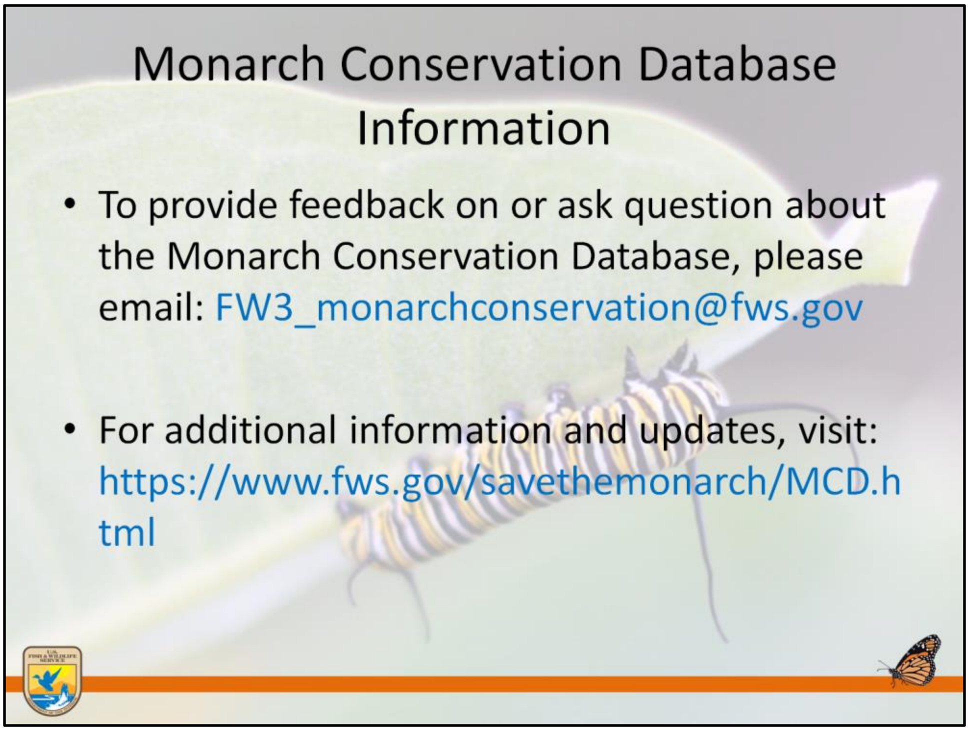
- Finally, I wanted to review how we will use data in the MCD to inform the listing decision.
    - In summary, we will calculate the percent change in habitat due to conservation efforts relative to the baseline presented in the "All Hands on Deck" paper by Thogmartin et al., 2017. The percent change based on the "All Hands on Deck" paper and information provided to the MCD will be compared to the percent change in future scenario projections developed as a part of the SSA, or Species Status Assessment.
        - Efforts that are complete and have been for more than 3 years will automatically be included in this evaluation and be incorporated into the species' current condition, or "All Hands on Deck" baseline. Efforts that are complete but for less than 3 years, are implemented but not yet complete, or have not yet been implemented are considered future efforts, and we will use responses to PECE policy questions to determine if the effort may be considered in our projection of future habitat due to conservation efforts.
    - Additionally, we will use information in the MCD to evaluate trends in monarch conservation efforts
        - All effort records in the database that are considered to be complete will be considered in the evaluation of trends in conservation efforts
        - Note that in this case, I'm not referring to the status of the effort

when I say "complete"; I'm talking about the record in the database having all of the required fields populated

- Decision makers may consider both products of the MCD in the listing decision process



- Before we launch the Q and A and discussion portion of the webinar, we will highlight some important dates coming up
  - The updated window for MCD web application testing will be between May4th and May 11th.
    - There is still time to volunteer to test drive the features and functions of the MCD web application – if you are interested, please let us know as soon as possible at FW3_monarchconservation@fws.gov. Please note that we are requesting that volunteers keep some time open during that window for an additional webinar and to actually test the web application.
  - We anticipate the MCD web application will officially launch for the public sometime between May 25thth and June 1st. We will likely host our tutorial webinar soon after the public launch.
    - If you are not able to attend the tutorial webinar, we will post a recording of that webinar and we will also have tutorials available that are specific to the different data entry scenarios discussed earlier in this presentation



- Thanks again for your interest and participation. As always, please feel free to contact at me anytime at the MCD email address.